

REPORT IDENTIFICATION

Report Title: **Annual Enrollment EE Records**

Menu Path: **State of Louisiana Reporting >> Benefits Management**

Transaction Code: **ZP269**

REPORT SELECTION CRITERIA AND OUTPUT

Selection Criteria:

Plan Year
 Personnel Number
 Personnel Area (*can be run for those personnel areas the user has access to*)
 Time Administrator
 See all records (check box)

Report Output:

Exception	Processed On
Proposed	Processed At
Personnel Area	Processed By
Time Administrator Number	Error
Personnel Number	Created on
Employee / Applicant Name	Created at
Infotype	Created by
Message	Last Resolved By (<i>Hidden</i>)
Delete / Delimit Indicator	

REPORT UTILIZATION

Primary Use:

To track health insurance, life insurance, and/or benefits elections made by the employee through an enrollment application, via Louisiana Employees Online (LEO).

NOTES AND TERMINOLOGY

This section contains helpful information including processing notes, critical definitions, and additional references to other reports and system tools.

Notes: This report has a tool located in the Exceptions column that allows the user to keep track of the enrollment process. The Exceptions column also indicates which records are created by the payroll system and which records **MUST** be created by the agency. Failure to create the manual records will result in no or incorrect payroll deductions. Failure to create the records may also prevent the employee from obtaining health or life coverage.

The Message column will state what records are going to be created or need to be created. This column is static.

The Error column will alert the user of any errors or statuses. Errors may require intervention from the agency to complete the enrollment.

As a default, only unprocessed records will output. To see all records, even processed, you will have to place a check in the “See all records” indicator located in the Selection Criteria section.

Legend: This report has several icons that also act as buttons for additional information.



There are four (4) status indicators for the Exceptions column.

This status is grayed out indicating that the system will attempt to create the necessary records. Agencies should not attempt to create a line item with this indicator unless directed by the LaGov HCM Help Desk.



The next three (3) indicators designate manual intervention by the agency. They resemble a “traffic light” and *can* be used to keep track of the manual entry.

Line items with the **RED** light **MUST** be manually created by the agency before payroll deductions change. The agency will use HRBEN0001 to create these master data records.



If the agency chooses to use this indicator, double clicking on the red light will change the indicator light to **YELLOW**. This designation signifies that agency is aware that a change is needed and is in the process of creating the record. It could be pending because the employee is to supply additional paperwork, HSA accounts aren’t open, other paperwork, etc.



If the agency chooses to use this indicator, double clicking on the yellow light will change the indicator light to **GREEN**. This designation signifies that the record is complete and the agency is satisfied with the record.

Double click the icon until the desired color selection is reached.



Double click this icon on the Proposed column to identify information about the employee’s selection. The agency will use this information to create the necessary records for active “traffic light” line items.

Definitions/

Results: Additional explanation of columns or messages for uncommon terms.

Plan Year This field must be completed with the year the new enrollment records begin.
EX: 2020 for records dated 01/01/2020.

Infotype This column alerts the agency of the infotype that is being maintained or needs to be maintained.

Message This column states more information about the election. It may state that a record creation is pending.

**Delete/
Delimit
Indicator** This column indicates that the employee requested a deletion or cancelation of a product.

Error This column will display any errors that may have occurred when the system attempted to post the new created election. Also, if the system was successful, the message "SUCESSFULLY PROCESSED" will be displayed.

Created on This column will indicate the date the record was elected in LEO.

Created at This column will indicate the time the record was elected in LEO.

Created by This column will indicate the person that made the election in LEO.

Last Resolved by This hidden column will indicate the person that last marked the line item as resolved or reviewed. Primarily used by the LaGov HCM Help Desk when reviewing errors.

See all records Selecting this option will display all records, even those which have processed.

References: For standard reporting information within LAGOV HCM, refer to the [LAGOV HCM Reports Manual](#) or online training from My Training in LEO.